

**Overview:**

In order to view and/or manage client level information, users are required to have a consent created in EIM/ESM. Users that enter client data for their organization will have this consent automatically generated by the system and will not need to create one manually. This system consent does not replace any program-specific *Consent to Serve* or *Sharing of Data* consents, requiring wet signatures.

However, if users are preparing to facilitate a client referral/transfer of client information, users can manually create a consent through EIM/ESM. Users will be required to select what information to be shared including the following scenarios:

Note: This functionality should only be used if users plan to share information with another provider organization.

Scenario A: How to access a student record to share basic demographic information (i.e. Face Sheet) across sites.

Complete the following steps to add a consent: Viewing Client Information

1. Select **Consents** from the navigation bar.
*The **Consent** page appears.*
2. Select auto-generated **Self** link.
*The **Update Consent** page appears.*
3. Click **[Add Organization link]** button.
4. Add legal name of school (*Hint:* Use %name for search criteria). See attached document.
5. Click the **[Search]** button.
6. Select individual site/school.
7. Edit **Effective Date From** field (this should match enrollment date).
8. Click the **[Save Changes]** button.

Scenario B: How to access a student to share basic demographic information as well as all service plan data (i.e. encounters).

Complete the following steps to view or update information:

1. Select **Consents** from the navigation bar.
*The **Update Consent** page appears.*
2. Review **Associated Service Plan** link for appropriate provider to verify a school has been identified. If no school is identified complete Scenario C.

Scenario C: A parent organization is enrolling a student in a sub-organization or satellite site (how to connect a service plan with basic information to forward).

Complete the following steps to enroll a student in sub-organizations or satellite sites to add services to be delivered:

1. Click the **[Add Organization Link]** button if no school is identified.
2. Add legal name of school.
3. Click **[Save Changes]**.

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